

IV-IC Index Code Table

The Index Code Table contains the internal organizational structure identified on the D02-D06 descriptor tables. An Index code is assigned to the lowest level of detail within that structure and is used on transactions to identify where costs should be captured at the organizational level.

The Index Code Table is available through Command **I.6** on the Table Maintenance/Inquiry screen.

STRUCTURE

The Index Code Table is divided into two segments: the control key and informational elements. The control key identifies each Index Code record and contains the Organization Code, Funding Fiscal Year and Index Code. The Organization Code identifies the agency. The Index Code is a four-digit, alpha-numeric code assigned at the lowest level of organizational detail.

The informational elements segment contains the Title and the following classification elements:

- ✧ Internal Organization Hierarchy (Section, Sub-Section, Unit, Sub-Unit, and Sub-Sub-Unit)
- ✧ Indicators that control the posting level of detail for accounting transactions
- ✧ Location and Project/Work Phase Code fields (optional)
- ✧ Statewide Agency Hierarchy levels (Level A, B, 1, 2, and 3)

The coding requirements for all of the informational elements are defined in Exhibit IV-IC-1.

RELATIONSHIP TO OTHER TABLES

During Index Code Table maintenance, the Organization Hierarchy (Section, Sub-section, Unit, Sub-unit, and Sub-sub-unit) is validated against the Organization Hierarchy Descriptor Table. The Location is validated against the Location Descriptor Table, and the Project Code is validated against the Project Control Table if they are used. The Agency Hierarchy (Level A, B, 1, 2, and 3) is validated against the Organization Control Table. The Index Code Table is used to validate the Index Code when used in other tables, such as the Cost Allocation and Employee Master Tables.

INPUT CODING

A listing of the fields contained on the Index Code Entry screen and/or on the activity reports is shown in Exhibit IV-IC-1. It includes explanations of the fields as well as coding instructions for data entry.

Data entered on the Index Code Entry screen is keyed from the Index Code Table Entry Form (CALSTARS 6). The form, shown in Exhibit IV-IC-2, is formatted the same as the Entry screen and is available at www.dof.ca.gov/html/calstars/forms.htm.

All table maintenance must be recorded on the Table Maintenance Control Log (CALSTARS 20) as described in the *Table Maintenance Log* section of Chapter IV.

INDEX CODE ENTRY SCREEN

The Entry screen shown below is available through Command **I.6**.

```

9990 I.6: Index Code Entry                                12-09-2004 08:48 AM

Function: _ (A=Add, C=Change, D=Delete, F=FFY Maint, N=Next, P=Print Table)
          (R=Recall Maint/Print, U=Gen Rec, V=View, W=Print Rec)

FFY: ____ INDEX> ____ TITLE> _____

ORG HIERARCHY:
SECTION> ____ SUB-SECTION> ____ UNIT> ____ SUB-UNIT> ____ SUB-SUB-UNIT> ____

INDICATORS:
ALLOT ORG> _ GL ORG> _ ACTIVE/INACTIVE> _

ADDITIONAL CLASSIFICATION:
PROJECT/WP> _____ LOCATION> _____

AGENCY HIERARCHY:
LEVEL A: ____ LEVEL B: ____ LEVEL 1: ____ LEVEL 2: ____ LEVEL 3: ____

Command: _____ LP DATE:
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
      Help Retrn Quit Log List Dfalt Bkwrđ Frwrđ Clear Main

```

Most Index Code Table maintenance, **A**=Add, **C**=Change, **D**=Delete, **F**=Funding Fiscal Year Maintenance, **N**=Next, **P**=Print Table, **R**=Recall Maintenance/Print, **U**=Generate a single record, **V**=View, and **W**=Print Record, can be performed from the Entry screen.

FFY maintenance (**G**enerate FFY, **P**=Print Table, **R**=Recall Maintenance/Print Request, and **X**=Delete FFY) is performed from the FFY Maintenance screen. Refer to the *FFY Maintenance* section in this chapter for further discussion.

INDEX CODE LIST SCREEN

The List screen is displayed when the **F5**=List key on the Entry screen is pressed.

Most table maintenance, **C**=Change, **D**=Delete, **F**=FFY Maintenance (**G**=Generate FFY and **X**=Delete FFY), **P**=Print Table, **R**=Recall Maintenance/Print, **U**=Generate a single record, **V**=View, and **W**=Print Record, may be initiated from the List screen. The List screen gives agencies the ability to select multiple records from the screen. Scrolling to another screen for additional selections is not allowed until all selected maintenance is finished.

An example of the screen is displayed below.

```

9990 Index Code List                                     12-09-2004 01:55 PM

Function: _ (F=FFY Maint, P=Print Table)                Go to Index: _____
          (R=Recall Maint/Print)                        FFY: 2004

Enter under F below: (C=Change, D=Delete, U=Gen Rec, V=View, W=Print Rec)
F INDX      TITLE                                     S  SS U  SU SSU  PROJ  WP A/I
- - - - -
_ 0110 REGION 1                                     11                0
_ 0120 REGION 2                                     12                0
_ 0130 REGION 3                                     13                0
_ 0140 REGION 4                                     14                0
_ 0150 REGION 5                                     15                0
_ 0160 REGION 6                                     16                0
_ 0170 REGION 7                                     17                0
_ 0180 REGION 8                                     18                0
_ 0190 REGION 9                                     19                0
_ 0210 STATE BOARD AND EXECUTIVE STAFF             21                0
_ 0215 OFFICE OF INFO TECHNOLOGY                   20                0

Command: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
      Help  Retrn Quit  Log          Bkwrdr Frwrdr Clear          Main

```

The list of Index Code (IC) records is displayed in IC order within the FFY. If the Entry screen is blank when **F5** is pressed, the list of IC records will begin with the first sequential record in the current FFY. Otherwise, it will begin with the FFY record shown when the **F5** was pressed.

The FFY is shown in the upper right corner of the screen. To change the FFY, enter the desired FFY and press **Enter**.

To find a specific record, enter the IC in the 'Go to Index:' field and press **Enter**. If the requested record exists, it will be the first record listed on the screen. If it does not exist, the list will start with the next sequential record.

To perform maintenance, either enter an **F**, **P** or **R** in the Function Field or enter a **C**, **D**, **U**, **V** or **W** in the **F** action column to the left of the desired record. Values cannot be keyed in the Function field and the **F** action column at the same time. However, multiple records may be selected from the **F** action column.

When multiple records are selected from the List screen and **Enter** is pressed, the first record retrieved is displayed on the Entry screen. When **C** or **D** is selected, the **C** or **D** is inserted in the Function field on the Entry screen. The **F2** key is used to go to the next record. All records are displayed in ascending order by Index within the FFY. All maintenance must be completed or cancelled (by pressing **F2** Next) before the List screen or the FFY Maintenance screen may be re-accessed.

INDEX CODE ACTIVITY LOG SCREEN

The Activity Log screen provides a historical log of all activity performed. The screen is displayed when the **F4**=Log key on the Entry or List screen is pressed. An example of the screen is displayed below.

```

9990 Index Code - Activity Log                                08-02-2007 08:55 AM

Sort: K (D=Date/Time, U=UserID, K=FFY/Indx)
-----Go To-----      -Go To--      --Go To--
      DATE      TIME      USERID      FFY      INDX

F      _ _ _ _ _      _ _ _ _ _      _ _ _ _ _      _ _ _ _ _      _ _ _ _ _
-      - - - - -      - - - - -      - - - - -      - - - - -      - - - - -
G 05-02-2007 06:02 PM CSAQKLC 2007 0130 13
G 05-02-2007 06:02 PM CSAQKLC 2007 0140 14
G 05-02-2007 06:02 PM CSAQKLC 2007 0150 15
G 05-02-2007 06:02 PM CSAQKLC 2007 0160 16
G 05-02-2007 06:02 PM CSAQKLC 2007 0170 17
G 05-02-2007 06:02 PM CSAQKLC 2007 0180 18
G 05-02-2007 06:02 PM CSAQKLC 2007 0190 19
G 05-02-2007 06:02 PM CSAQKLC 2007 0210 21
G 05-02-2007 06:02 PM CSAQKLC 2007 0215 20
G 05-02-2007 06:02 PM CSAQKLC 2007 0220 22
G 05-02-2007 06:02 PM CSAQKLC 2007 0230 23
G 05-02-2007 06:02 PM CSAQKLC 2007 0240 24

Command: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
      Help  Retrn Quit              Dtail          Bkwrđ Frwrđ              Main

```

The list of activity records is sorted by date when **F4** is pressed if the Entry screen is blank or if the cursor on the List screen is not positioned on a record. The records are displayed in descending order beginning with the most recent activity performed. A **D** is displayed in the Sort field, and the Date/Time columns are displayed in white to indicate Date/Time as the sort order.

The list of activity records is sorted by FFY/Index when **F4** is pressed if a record is displayed on the Entry screen or if the cursor is positioned on a List screen record. The records are displayed by FFY/Index in ascending order beginning with the FFY/Index of the record previously on the Entry screen or the FFY/Index of the List screen record where the cursor was positioned. If there are multiple activity records for the same FFY/Index, those records are displayed by Date/Time with the most recent transaction on top. The Sort field displays a **K**, and the FFY/Index column is displayed in white to indicate FFY/Index as the sort order.

Activity records may be re-sorted by keying a **D**=Date/Time, **U**=UserID, or **K**=FFY/Index in the Sort field. For example, when **U**=UserID is keyed, the records are displayed in ascending order by UserID.

To search for a specific record(s), key a Date/Time, UserID, FFY, or FFY/Index in the 'Go To' fields available below the Sort field. The first record matching the selection criteria displays on the first line, and the records are re-sorted according to the search field used. If multiple matching records are found, the matching records are displayed by Date/Time with the most recent transaction on top. If no matching record is found, the next sequential record is displayed according to the search field used.

Although all IC Table records can be viewed on the IC Entry screen, only the most recent activity records can be viewed on the Log screen. Each year on March 31 records older than three years are purged.

LOG DETAIL SCREEN

The Log Detail screen displays the maintenance activity for a selected record. The Log Detail screen is accessed from the Activity Log screen. To view a maintenance record, place the cursor on any record line and press **F5=Dtail**.

An example of the Log Detail screen is displayed below.

```

9990 Index Code Log Detail - Date/Time Order                                08-02-2007 09:07 AM

Function: G  DATE: 05-02-2007  TIME: 06:02:00 PM  USERID: CSAQKLC

FFY: 2007  INDEX: 0140  TITLE: REGION 4

ORG HIERARCHY:
SECTION: 14  SUB-SECTION:          UNIT:          SUB-UNIT:          SUB-SUB-UNIT:

INDICATORS:
ALLOT ORG: 0  GL ORG: 0  ACTIVE/INACTIVE: 0

ADDITIONAL CLASSIFICATION:
PROJECT/WP:          LOCATION:

AGENCY HIERARCHY:
LEVEL A:          LEVEL B:          LEVEL 1:          LEVEL 2:          LEVEL 3:

Command: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
      Help  Retr  Quit              Bkwr  Frwr              Main

```

Note that the Function as well as the entire maintenance record is displayed. For Change maintenance transactions, the changed fields are highlighted.

The F7 and F8 keys are used to scroll through the maintenance records. The sort specified on the Activity Log screen is maintained when scrolling through the Log Detail records.

FFY MAINTENANCE SCREEN

The FFY Maintenance screen is available for online tables that have a FFY and require FFY maintenance, such as the **Generate** function. The FFY Maintenance screen is accessed from:

- ✧ the Index Code Entry or List screen by keying a **F** in the Function field and pressing **Enter** (Entry screen must be blank, except FFY, when **Enter** is pressed)
- ✧ the I: Table Maintenance/Inquiry screen by keying **80** in the Code field at the bottom of the screen and pressing **Enter**
- ✧ any CALSTARS screen with a Command line by keying **I.80** on the Command line and pressing **Enter**.

An example of the screen is displayed below.

```

9990 FFY Maintenance                                02-24-2005 01:36 PM

Enter under F below: (G=Generate FFY, P=Print Table, R=Recall Maint/Print)
                    (X=Delete FFY)
Enter under FFY below the year to Generate from, Delete, or Print.

F  FFY          TABLE
-  ---  -
-  2007  Index Code      (IC)
-       Appropriation Symbol (AS)
-       Program Cost Account (PCA)
-       Cost Allocation      (CA)
-       Employee Master      (EM)

-       DGS Invoice Allocation (EA)
-       DGS Services         (OD)

Press Enter to submit request(s)

Command: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
      Help  Retrn Quit                                Clear                                Main

```

To initiate maintenance activity from the FFY Maintenance screen, key **G**, **P**, **R** or **X** in the F action column to the left of the desired table. Key the appropriate FFY, and press **Enter**. If the FFY is displayed on the Entry or List screen when the **F** Function is initiated, the FFY will already be displayed on the FFY Maintenance screen.

TABLE MAINTENANCE FUNCTIONS

The following functions (except **G**, **X** and some **P**) are performed online for an immediate update. Updated records are ready for use as soon as they are successfully entered.

A=AddFrom The Entry Screen:

Key an **A** in the Function field, the FFY, Index Code, and the appropriate values in the informational elements fields to **Add** a record to the IC Table. When all data is entered on the screen, press **Enter**. If the transaction passes all online edits, it updates the IC file. A fresh screen is displayed with blank data fields, and a message confirming that the IC Table record was added successfully is displayed at the bottom of the screen.

From The List Screen:

The **Add** function is not available on the List screen.

C= ChangeFrom The Entry Screen:

To **Change** a record, the record must first be displayed on the screen. To display a record and make a change, either:

- (1) Scroll through the records using the **F7** and **F8** keys, and key a **C** in the Function field of the desired record.
- (2) Key a **V** in the Function field, the appropriate values in the FFY and the Index Code fields, and press **Enter** to **View** a record. Key a **C** in the Function field.
- (3) Key a **C** in the Function field, the appropriate values in the FFY and the Index Code fields, and press **Enter**.

Key over the fields to be changed, and press **Enter**. When **Enter** is pressed, the IC record is displayed with the changes. A message confirming that the record was changed successfully is displayed at the bottom of the screen.

From The List Screen:

Key a **C** in the F action column to the left of the desired IC record(s), and press **Enter** to display the record on the Entry screen. Key over the fields to be changed, and press **Enter**. When **Enter** is pressed, the record is displayed with the changes. A message confirming that the record was changed successfully is displayed at the

bottom of the screen. Use **F2** to proceed to the next selected record or to return to the List screen.

Note: To blank out (delete) information on input fields, use the delete key or the space bar. Dollar signs are no longer used in Change transactions to delete information on input fields.

D=Delete

From The Entry Screen:

To **Delete** a record, either:

- (1) Scroll through the records using the **F7** and **F8** keys, key a **D** in the Function field of the desired record, and press **Enter**.
- (2) Key a **V** in the Function field, the appropriate values in the FFY and the Index Code fields, and press **Enter** to **View** a record. Key a **D** in the Function field, and press **Enter**.
- (3) Key a **D** in the Function field, the appropriate values in the FFY and the Index Code fields, and press **Enter**.

The record and the Action Confirmation pop-up screen are displayed. The pop-up screen is shown below.

<p style="text-align: center;">A C T I O N C O N F I R M A T I O N</p> <p style="text-align: center;">Delete Index Code Record</p> <p style="text-align: center;">Press F4 to confirm; F2 to cancel</p>

If **F4** is selected, the record is deleted immediately.

If **F2** is selected, the record remains in the IC Table.

A message confirming that the record was deleted successfully or that the **Delete** function was cancelled is displayed at the bottom of the screen. When either is selected, the record remains on the Entry screen, and the Function field is blank.

From The List Screen:

Key a **D** in the F action column to the left of the desired record, and press **Enter**. The record and the Action Confirmation pop-up screen are displayed.

If **F4** is selected, the record is deleted immediately.

If **F2** is selected, the record remains in the IC Table.

A message confirming that the record was deleted successfully or that the **Delete** function was cancelled is displayed at the bottom of the screen. When either is selected, the record remains on the Entry screen, and the Function field is blank. Use **F2** to proceed to the next selected record or return to the List screen.

F=FFY Maint

The **F=FFY** Maintenance function is used to access the FFY Maintenance screen. To access the screen, key a **F** in the Function field of the Index Entry or List screen and press **Enter**. Refer to the FFY Maintenance Screen section (previous section in this chapter) for more information.

G=Generate FFY

The **Generate** function copies Index Code records from one year to the next and increases the FFY by one during overnight processing. This function is only available through the FFY Maintenance screen.

To initiate the **Generate** function from the FFY Maintenance screen, key a **G** in the F action column on the Index Code line. Key the appropriate Year 1 FFY in the FFY field to create Year 2 FFY records as displayed in the example below.

Key the existing FFY: (Year 1) in the FFY field	To Generate records for: (Year 2)
2007	2008
2008	2009
2009	2010

When **Enter** is pressed, a confirmation message is displayed at the bottom of the screen. Use **F2** to return to the previous screen.

The **Generate** function may be run more than once for the same fiscal year to add new Year 1 records to Year 2. For example, using the **Generate** function a second time may be quicker than manually adding new Year 1 records to Year 2 records after Year 1 records were generated. The **Generate** function does not update or replace records previously **Added** or **Generated**, so records are not duplicated.

If an attempt is made to **Generate** records that have already been **Added**, an error message is displayed on the Index Code (IC) Table Activity Report for each existing record. However, error messages are not issued when an attempt is made to **Generate** previously generated records. If the **G=Generate** function is keyed more than once during the same processing day, an online message is displayed stating that the Generate FFY has already been requested.

N=NextFrom The Entry Screen:

Next performs the same as the **Add** function, except the data remains on the screen after **Enter** is pressed.

From The List Screen:

The **Next** function is not available on the List screen.

P=Print Table

The **Print Table** function causes the Print/Report File Selection pop-up screen to be displayed. This pop-up screen gives agencies the option of generating an electronic report file of the Index Code (IC) Table Listing Report and/or printing the report. If a FFY is displayed on the pop-up screen when a report is requested, only records for the specified FFY are selected. If the FFY field is blank, the entire Index Code Table (all FFYs) is selected. An example of the CSB920-2 report is displayed in Exhibit IV-IC-3.

From The Entry Screen:

Key a **P** in the function field, and press **Enter** to display the Print/Report File Selection pop-up screen. If a FFY is displayed on the Entry screen when **Enter** is pressed, the FFY is displayed on the pop-up screen. If the FFY field is blank when Enter is pressed, the FFY is not displayed on the screen.

From The List Screen:

Key a **P** in the function field, and press **Enter** to display the Print/Report File Selection pop-up screen. To request all records within the Index Code Table, delete the FFY from the FFY field on the pop-up screen.

From The FFY Maintenance Screen:

Key a **P** in the F action column, the FFY if desired, and press **Enter** to display the Print/Report File Selection pop-up screen. If a FFY is displayed on the FFY Maintenance screen when **Enter** is pressed, the FFY is displayed on the Print/Report File Selection pop-up screen. If the FFY field is blank when Enter is pressed, the FFY is not displayed on the screen.

An example of the pop-up screen is shown below.

```
Print/Report File Selection
Index Code (IC) Table

____ Enter FFY or leave blank for entire table

_ Enter Destination:
  F=Report File only
    Report File: CS9990.CSI920-2.TBL-IC.IQ.D2050308.T1039394
  P=Printer Output and Report File
    Printer ID : CTP2      Report Class: Z      Report ID: ITBL
    Report File: CS9990.CSI920-2.TBL-IC.IQ.D2050308.T1039394
  O=Report Output after Overnight Processing
    Printer ID : CTP2      Report Class: A      Report ID: TBLE

Press Enter to submit the request, or press PF2 to cancel
```

Key one of the following 3 options in the Destination field on the pop-up screen:

- F** – Immediately generates an electronic report file of the Index Code (IC) Table Listing Report (CSI920-2)
- P** – Immediately generates an electronic report file of the Index Code (IC) Table Listing Report (CSI920-2) and ROPES the Index Code (IC) Table Listing Report (CSI920-2) to an agency printer
- O** – ROPES the Index Code (IC) Table Listing Report (CSB920-2), including the current day's table maintenance, to an agency printer after overnight processing is complete

When **Enter** is pressed, a confirmation message is displayed at the bottom of the screen. Use **F2** to return to the previous screen (Entry, List or I: Table Maintenance/Inquiry).

Note: The Print Output Destination is maintained by CALSTARS staff. To request a change, send an e-mail to calstars@dof.ca.gov. Include 'Report Routing' in the subject line.

R=Recall Maintenance/Print

The Recall function is used to delete overnight IC table maintenance before it is initiated.

From The Entry Screen Or The List Screen:

Key an **R** in the function field, and press **Enter** to display the Recall Overnight Maintenance/Print Request pop-up screen as shown below. The FFY must be blank when **Enter** is pressed. Use **F2** to return to the Entry or the List screen.

From The FFY Maintenance Screen:

Key an **R** in the F action field, and press **Enter** to display the Recall Overnight Maintenance/Print Request pop-up screen. The FFY must be blank when **Enter** is pressed.

An example of the pop-up screen is shown below.

```
Recall Overnight Maintenance/Print Request
Index Code (IC) Table

Select one or more with a 'Y':

_ Remove the request to Delete FFY 1997
_ Remove the request to Generate FFY 2004
_ Remove the request to Print FFY 2003
*** End of Data ***

Press Enter to remove the request(s).
PF2          PF7  PF8
Retrn        Bkwrд Frwrд
```

Key a **Y** in the field to the left of the desired maintenance or print request(s), and press **Enter** to delete the request(s). A confirmation message is displayed at the bottom of the screen.

U=Generate RecordFrom The Entry Screen:

Key a **U** in the Function field, the FFY and Index Code in their respective fields, and press **Enter** to generate an individual record for the new FFY. A message confirming that the record was successfully generated is displayed at the bottom of the screen.

From The List Screen:

Key a **U** in the F action column to the left of the desired IC record(s) and press **Enter**. A message confirming that the record was successfully generated is displayed at the bottom of the screen. Use **F2** to proceed to the next selected record or to return to the List screen.

V=ViewFrom The Entry Screen:

Key a **V** in the Function field, the FFY and Index Code in their respective fields, and press **Enter** to **View** a record. A confirmation message is displayed at the bottom of the screen.

From The List Screen:

Key a **V** in the F action column to the left of the desired record, and press **Enter**. A confirmation message is displayed at the bottom of the screen. Use **F2** to proceed to the next selected record or to return to the List screen.

W=Print Record

The **W** function immediately prints a single record report (CSI920-2) and generates a single record report file from the Index Code Table. The printed report is ROPED to the agency printer in the ITBL queue. The electronic report file naming convention is CSxxxx.CSI920-2.TBL-IC.IQ.Dcyymmdd.Thhmmss.

From The Entry Screen:

Key a **W** in the Function field, the FFY and Index Code in their respective fields, and press **Enter** to print the record and generate the report file. The record is displayed with a confirmation message at the bottom of the screen

From The List Screen:

Key a **W** in the F action column to the left of the desired index record, and press **Enter** to print the record and generate the report file. The record is displayed on the Entry screen with a confirmation message. Use **F2** to proceed to the next selected record or to return to the List screen.

X=Delete FFY

The **X=Delete FFY** function initiates the deletion of all IC records for a specified FFY during overnight processing. This function is only available through the FFY Maintenance screen.

If a FFY is displayed on the Entry or List screen before **Enter** is pressed, the FFY is displayed on the pop-up screen. If the FFY field is blank when Enter is pressed, it is necessary to key the FFY.

Key **X** in the F action column (on the maintenance screen), the FFY in the FFY field if necessary, and press **Enter**. The Action Confirmation pop-up screen is displayed as shown below.

A C T I O N C O N F I R M A T I O N

Delete all Index Code records for 2000

Press F4 to confirm; F2 to cancel

If **F4** is selected, **all** table records for the selected FFY will be deleted during the next overnight processing cycle.

If **F2** is selected, the FFY records remain in the Index Code Table.

A message confirming that the records were deleted successfully or that the **Delete** function was cancelled is displayed at the bottom of the screen.

Note: If an attempt is made to delete the current, prior or prior-prior FFY, an error message is displayed at the bottom of the screen.

FUNCTION (F) KEYS

The program function keys are used for online help, for efficient navigation to various online screens, for establishing defaults, and for clearing the screen. The following F keys are available for the Index Code Table screens:

F1=Help—The following two types of online help is available on pop-up screens:

- ✧ Field look-up assistance is available for fields that display a “>” (greater than) sign to the right of the field label. When the cursor is placed on any space within a field having a “>” and **F1** is pressed, a pop-up screen displays a list of the available values for that field. To locate a desired code, use the F7 and F8 keys to scroll through the listing or use the search option. To begin a search, enter a portion or all of a number or title in the fields at the top of the pop-up window and press Enter. To insert a code on the Entry screen, use the mouse or arrow keys to place the cursor on the row that includes the desired code. The code is automatically inserted on the Entry screen when Enter is pressed.

NOTE: When table look-up assistance is used with the Index or Title fields, the entire record is displayed when a selection is made.

- ✧ General text information is available when the cursor is placed on the screen and **F1** is pressed. This does not apply for fields with look-up assistance.

F2=Retrn (Return) or **Next**—The following two functions are available for the **F2** key.

Retrn—Exits the present activity and displays the prior or higher order menu or screen. All data entered on the screen, but not accepted before exiting, is lost.

Next—When more than one record is selected for action from the List screen and **Enter** is pressed, the first selected record is displayed. The label below the **F2** key changes from **Retrn** to **Next**. When **F2=Next** is pressed, the next selected record is displayed. The records are displayed one at a time in ascending order. When the last record selected is displayed, the label below the **F2** key changes back to **Retrn**.

F3=Quit—Exits the present activity in preparation for CALSTARS logoff. An action confirmation pop-up screen will display to confirm the **Quit** action. Data entered on the screen, but not accepted for processing, remains on the screen if **F2** (resume) is selected. When **F3** is selected, the CALSTARS logoff is initiated. All data entered on the screen, but not accepted for processing, is lost.

F4=Log—Displays the Index Code Log Activity screen.

F5=List or Log Detail—The following two functions are available for the F5 key.

List—Displays the Index Code List screen.

Log Detail—Displays the Index Code Log Detail screen.

F6=Dfalt (Default)—Locks and unlocks fields for data entry. Defaults may be set to retain coding information for use in consecutive transactions and to "skip" unused fields so the cursor stops only at fields to be keyed. Values cannot be changed in locked fields.

To set Defaults:

1. Enter data in the fields that are to become defaults (i.e., used in the current and subsequent transactions).
2. To skip fields that will not be used, enter a period (.) in the first position of the fields.
3. Press **F6** to lock these fields as defaults. This changes the characters to green and the underline is removed.

Enter the remainder of the data needed for the transaction, and press **Enter** to 'save' the transaction.

Defaults may be turned on or off at any time during the transaction entry process by alternately pressing **F6**.

F7=Bkwrđ (Backward)—Go to the previous record (page of records).

F8=Frwrđ (Forward)—Go to the next record (page of records).

F9=Clear—Erases all keyed fields except any fields locked by **F6=Dfalt**.

F12=Main—Go to the CALSTARS main menu. All data entered on the screen, but not accepted for processing, is lost.

IC TABLE REPORTS

The following reports are system generated:

- ✧ Index Code (IC) Table Activity Report (CSB920-1) - This report displays all transactions successfully entered online during the work day. It is produced during overnight processing whenever online table maintenance has been completed. The report is displayed in Exhibit IV-IC-3.
- ✧ Index Code (IC) Table – Delete FFY (yyyy) Report (CSB920-3) –This report displays all records deleted when Function **X**=Delete FFY is entered. The report is displayed in Exhibit IV-IC-3.
- ✧ Index Code (IC) Table Upload Activity Report (CSB920-4) – This report displays all transactions processed from external input files and corresponding error codes and messages, if applicable. The report is displayed in Exhibit IV-IC-3.

The following reports are produced upon agency request:

- ✧ Index Code (IC) Table Listing Report (CSB920-2/CSI920-2) - This report is produced when function **P**=Print Table or **W**=Print Rec (1 record only) is entered on the Index Code screen. If Function **P** and a Funding Fiscal Year are entered, the listing is limited to the specific fiscal year requested. If **P** is entered without a FFY, the listing contains all fiscal years in the Index Code table. The report is displayed in Exhibit IV-IC-3.

NOTE: CSBnnn-n and CSInnn-n reports contain the same information and are identical in format. Therefore, only CSBnnn-n reports are displayed in the report examples.

The difference between the CSB and CSI reports is based on when the reports are generated. CSB reports are generated during CALSTARS nightly processing and, therefore, include all table maintenance performed up to the time at which nightly processing begins. CSI reports are generated immediately and include all maintenance performed up to the time at which the report is requested.

CONTROL

The Index Code (IC) Table Activity Report (CSB920-1) and the Index Code (IC) Table Upload Activity Report (CSB920-4) should be proofread to ensure that all maintenance was done correctly.

A control log and the activity reports should be maintained for the same amount of time as the accounting transactions they control.

EXHIBIT IV-IC-1
INDEX CODE TABLE AND REPORT FIELD DESCRIPTIONS

Data Element	Length	Contents
<u>Control Key:</u>		
ORGANIZATION NUMBER (ORG)	4	The Organization Code is automatically displayed based on the signon used. It cannot be altered.
FUNDING FISCAL YEAR (FFY)	4	Enter the Funding Fiscal Year that identifies the year to which this record pertains.
INDEX (INDX)	4	Enter the Index Code. This code may be alpha-numeric. Special symbols and code 0000 are not allowed.
<u>Informational Elements:</u>		
TITLE	40	Enter the Index Code Title.
SECTION (S)	2	Enter the Section code (from I.5.02 Organization Descriptor Table) or leave blank if Section is not used.
SUB-SECTION (SS)	2	Enter the Sub-Section code (from I.5.02 Organization Descriptor Table), or leave blank if Sub-Section is not used.
UNIT (U)	2	Enter the Unit code (from I.5.02 Organization Descriptor Table), or leave blank if Unit is not used.
SUB-UNIT (SU)	2	Enter the Sub-Unit code (from I.5.02 Organization Descriptor Table), or leave blank if Sub-Unit is not used.
SUB-SUB-UNIT (SSU)	2	Enter the Sub-Sub-Unit code (from I.5.02 Organization Descriptor Table), or leave blank if Sub-Sub-Unit is not used.
<u>Indicators:</u>		
ALLOTMENT ORGANIZATION INDICATOR (ALLOT ORG)	1	<p>Enter the organizational and fund level code that identifies the level to record and control allotments in the A-series Allotment Reports:</p> <ul style="list-style-type: none"> 0 - No allotment by Organization 1 - Control at Section level 2 - Control at Sub-Section level 3 - Control at Unit level 4 - Control at Sub-Unit level 5 - Control at Sub-Sub-Unit level 6 - Control at Index Code level A - Control at Fund Level only (at org code key level) B - Control at Section and Fund level C - Control at the Sub-Section and Fund level D - Control at the Unit and Fund level E - Control at the Sub-Unit and Fund level F - Control at the Sub-Sub-Unit and Fund level G - Control at the Index Code and Fund level
GENERAL LEDGER ORGANIZATION INDICATOR (GL ORG)	1	<p>Enter the general ledger posting level code to be maintained.</p> <ul style="list-style-type: none"> 0 - Maintain the general ledger at the Organization level 1 - Maintain the general ledger at the Section level (Requires an IC on all financial transactions).

EXHIBIT IV-IC-1
INDEX CODE TABLE AND REPORT FIELD DESCRIPTIONS

Data Element	Length	Contents
ACTIVE/INACTIVE INDICATOR (A/I)	1	Enter the code to specify whether the Index Code is active or inactive: 0 - Active - transactions referencing this IC Table record will post after passing the normal edits. 1 - Inactive - transactions referencing this IC Table record will not post unless the Modifier = I (eye) in the transaction (to override an inactive table).
PROJECT (PROJ)	6	Enter the Project Number (from I.10 Project Control Table) , or leave blank.
WORK PHASE (WP)	2	Enter the Work Phase (from I.10 Project Control Table) , or leave blank if Project is blank.
LOCATION	6	Enter the Location Code (from I.5.35 Location Descriptor Table) , or leave blank.
<u>Agency Hierarchy:</u>		The following data elements are only entered if they override the Organization Control Table. If entered, at least Levels A, B and 1 must be entered.
LEVEL A (LVL-A)	4	Leave blank or to override the Organization Control Table: Enter the statewide agency hierarchy (from I.5.01 Organization Descriptor Table) Agency code (If used, must match the OC Table)
LEVEL B (LVL-B)	4	Sub-Agency code (If used, must match the OC Table)
LEVEL 1 (LVL-1)	4	Department code (If used, must match the OC Table)
LEVEL 2 (LVL-2)	4	Sub department code, or leave blank if appropriate.
LEVEL 3 (LVL-3)	4	Sub-sub department code, or leave blank if appropriate.
<u>THE FIELD BELOW IS DISPLAYED ON THE ENTRY SCREEN AND ON THE CSB920-2 AND CSB920-3 REPORTS:</u>		
LAST PROCESSED DATE (LP)	2+2+4	The Last Processed Date is the last date the record was updated by table maintenance. This field is updated when a transaction is processed. It cannot be altered by the user.
<u>THE FIELDS BELOW ARE ONLY DISPLAYED ON THE CSB920-1 AND CSB920-4 REPORTS:</u>		
TRANSACTION DATE	2+2+4	The Transaction Date identifies the date the transaction was processed.
TRANSACTION TIME	2+2+2	The Transaction Time identifies the time the transaction was processed.
USER IDENTIFICATION (USERID)	7	The User Identification identifies the Sign-on ID used to input the transaction.

EXHIBIT IV-IC-2

CALSTARS 6

(revised 04-29-2005)

INDEX CODE (IC) TABLE ENTRY FORM

ORG: _____

PREPARED BY: _____

DATE: _____

ENTERED BY: _____

DATE: _____

FUNCTION☐

(A=Add, C=Change, D=Delete, F=FFY Maint, N=Next, P=Print Table)

(R=Recall Maint/Print, U=Gen Record, V= View, W=Print Record)

FFY

☐

INDEX

☐

TITLE

☐**ORG STRUCTURE:**

SECTION

☐

SUB-SECTION

☐

UNIT

☐

SUB-UNIT

☐

SUB-SUB-UNIT

☐**INDICATORS:**

ALLOT ORG

☐

GL ORG

☐

ACTIVE/INACTIVE

☐**ADDITIONAL CLASSIFICATION:**

PROJECT/WP

☐☐

LOCATION

☐**AGENCY HIERARCHY:**

LEVEL A

☐

LEVEL B

☐

LEVEL 1

☐

LEVEL 2

☐

LEVEL 3

☐**F=FFY MAINT FUNCTION SELECTED, FUNCTION ON FFY MAINT SCREEN**☐

(G=Generate FFY, P= Print Table)

(R=Recall Maint/Print, X=Delete FFY)

P=PRINT FFY FUNCTION SELECTED, REPORT DESTINATION☐

(F=Report File only, P=Printer Output and Report File, O=Overnight Printer Output)

ADDITIONAL FFYS TO PRINT

R=RECALL MAINT FUNCTION SELECTED, ACTION(S) TO RECALL

EXHIBIT IV-IC-3

CSB920-1 9990 (DEST: A1 CTP2) *****				DEPARTMENT OF AIR QUALITY				*****				ORG NUMBER: 9990	
CALSTARS				INDEX CODE (IC) TABLE ACTIVITY				REPORT				ORG PAGE: 1	
11/30/2004 (06:00) *****				*****				*****				RUN PAGE: 1	
				-ORGANIZATION-		ALLOT	GL	----- TRANSACTION -----					
FFY	INDX	F	TITLE	S	-SS-U	-SU-SSU	ORG	ORG	A/I	DATE	TIME	USERID	
----	----	-	-----				-	-	-				
				PROJ	WP	LOCATION	LVL-A	LVL-B	LVL-1	LVL-2	LVL-3	ERROR MESSAGES	
				----	--	-----	----	----	----	----	----	-----	
2000	5000	C	DIRECTOR'S OFFICE							11-29-2004	02:05:20 PM	CSCSPRT	
2004	9990	A	LABOR DISTRIBUTION CONTROL	99			0	0	0	11-29-2004	02:28:56 PM	CSCSPRT	
1995		X								11-29-2004	02:33:40 PM	CSCSPRT	
												N02-SEE REPORT CSB920-3	
1997		O								11-29-2004	02:34:39 PM	CSCSPRT	
												N02-SEE REPORT CSB920-2	

CSB920-2 9990 (DEST: A1 CTP2) *****			DEPARTMENT OF AIR QUALITY			*****			ORG NUMBER:	9990
CALSTARS			INDEX CODE (IC) TABLE LISTING			REPORT			ORG PAGE:	1
11/30/2004 (06:00) *****			*****			*****			RUN PAGE:	5
INDX	FFY	TITLE	-ORGANIZATION-		ALLOT	GL				
----	----	-----	S	-SS-U -SU-SSU	ORG	ORG	A/I	LP DATE		
			PROJ	WP	LOCATION	LVL-A	LVL-B	LVL-1	LVL-2	LVL-3
			----	--	-----	----	----	----	----	----
5000	1997	DIRECTOR'S OFFICE	50-10			6	0	1	11-23-2004	
5100	1997	PRODUCERS OFFICE	50-20-10			6	0	0	11-29-2004	
5200	1997	LEGAL AFFAIRS OFFICE	50-40-30			6	0	0	11-29-2004	

EXHIBIT IV-IC-3 (Continued)

```

CSB920-3 9990 (DEST: A1 CTP2) *****
                                CALSTARS      DEPARTMENT OF AIR QUALITY      *****
                                INDEX CODE (IC) TABLE - DELETE FFY (1995)      REPORT      ORG NUMBER: 9990
11/30/2004 (06:00) *****      ORG PAGE: 1
                                *****      RUN PAGE: 1

INDX  FFY      TITLE
-----
5000  1995  DIRECTOR'S OFFICE
5100  1995  PRODUCERS OFFICE

-ORGANIZATION-  ALLOT  GL
S -SS-U -SU-SSU  ORG  ORG  A/I      LP DATE
-----
PROJ  WP  LOCATION  LVL-A  LVL-B  LVL-1  LVL-2  LVL-3
-----
50-10      6      0      1      11-29-2004
50-20-10    6      0      0      11-29-2004

```

```

CSB920-4 4170 (DEST: A1 CTP2) *****
                                CALSTARS      DEPARTMENT OF AIR QUALITY      *****
                                INDEX CODE (IC) TABLE UPLOAD ACTIVITY      REPORT      ORG NUMBER: 9990
11/30/2004 (06:00) *****      ORG PAGE: 1
                                *****      RUN PAGE: 1

FFY  INDX  F      TITLE
-----
2002  7000  D  LTC/AGING SERVICES DIVISION (DEP DIR)
2002  7000  A  COMMUNITY RELATIONS
2002  7000  C  COMMUNITY RELATIONS

-ORGANIZATION-  ALLOT  GL
S -SS-U -SU-SSU  ORG  ORG  A/I      DATE      TIME      USERID
-----
PROJ  WP  LOCATION  LVL-A  LVL-B  LVL-1  LVL-2  LVL-3      ERROR MESSAGES
-----
70-05      6      0      0      11-30-2004  06:00:00 AM  UPLOAD
50-60      6      0      0      11-30-2004  06:00:00 AM  UPLOAD
70-05      6      0      0      11-30-2004  06:00:00 AM  UPLOAD

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